Mississippi Management and Reporting System

Department of Finance and Administration

MMRS MASH/Training Materials		
8202	LSO Training Coordinator Guidelines	Effective Date: 05/01/2016
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Book an Employee in Course

As your Agency's Training Coordinator, you will have the ability to directly book one or more of your employees into training sessions. You will access LSO through the MAGIC portal and start by selecting the "**Training Coordinator**" Tab. Continue to follow these steps to book employees into a course:

1. Select the "**Participation**" link in your left-hand navigation bar.

2. Click on the "**Manage Participants**" link in your left-hand navigation bar.

3. Type your employee's last name in the **Find** box to search for the employee(s) you would like to book for a training course.

4. Select "**Person**" from the drop-down menu below it, and select the **Go** button.

   <u>Helpful Hint:</u> If you'd like to enroll **all** of your employees, just place your org unit number in the "Find" field and select your "Organizational Unit" from the drop-down menu.

5. Highlight the employee from the **"Available"** box and select the arrow to insert employee into the **"Selected"** box.

6. Select the "**Next**" button.

7. Select the "**Book New Course for All**" button to select the course.

8. Browse the Course Catalog for the course, or select the radio button for "**Keyword Search**." The results of your search are displayed in a window on the same screen.

   <u>Helpful Hint:</u> Try to be as specific as possible when entering your search term. The course title, or partial course title, works best, as it narrows your search results.

9. Select the box next to the Course and training date you would like your employee(s) to attend. The course is highlighted.

10. Select the "**Next**" button. A cost summary of the course appears. The "Fee" box indicates the cost to attend training for this course.

11. Select the "**Book**" button.

12. Select the "**Next**" button to finalize the booking. The final confirmation screen appears indicating your employee has been successfully booked.

13. Select the **Close** button.

Prebook an Employee in Course

An employee or you can use the LSO Prebooking function to express employee interest in attending courses that are not currently scheduled. Your employee will be notified in the "Messages and Notes" section when new sessions are scheduled.

1. Select the **Training Coordinator** tab.

2. Select **Participation** link in your left-hand navigation bar.

3. Click on the "**Manage Participants**" link in your left-hand navigation bar.

4. Type your employee's last name in the **Find** box to search for the employee(s) you would like to prebook for a training course.

5. Select "**Person**" from the drop-down menu below it and select the **Go** button.

   <u>Helpful Hint:</u> If you'd like to enroll all of your employees, place your org unit number in the "Find" field and select your "Organizational Unit" from the drop-down menu.

6. Highlight the employee from the "Available" box and select the arrow to insert employee into the "**Selected"** box.

7. Select the "**Next**" button.

8. Click the "**Prebook Course for All**" button.

9. Browse the Course Catalog for the course, or select the radio button for "**Keyword Search**." The results of your search are displayed in a window on the same screen.

   <u>Helpful Hint:</u> Try to be as specific as possible when entering your search term. The course title, or partial course title, works best. This will narrow your search results.

10. Select the box next to the Course and training date you would like your employee(s) to be prebooked. The course is highlighted.

11. Select the "**Next**" button. A cost summary of the course appears. The "Fee" box indicates the cost to attend the course training.

12. Click the "**Next**" button.

13. Set the validity period and select the preferred training location.

    <u>Helpful Hint:</u> Select the small boxes to the right of "Preferred Location," "Preferred Start Date," and "Preferred End Date" to select the location and dates you would prefer for the employee. This is not a required field.

14. Select the "**Prebook**" button.

15. Select the "**Next**" button. The final confirmation screen appears indicating the "Prebooking" was successful.

16. Select the **Close** button

    Helpful Hint: Courses that meet your employees' prebooking criteria will appear in their Messages and Notes section when they are scheduled. Employees can book themselves in those courses at that time by selecting the course title or date link for the session they wish to attend and following the standard booking procedure from the "LSO Learner" training. Only one prebooking may exist for a given course in a specified time period. Their Prebook lists will reflect the most recent data entered.

Canceling Course Bookings

As an Agency Training Coordinator, you can also use the "Manage Participation" function to cancel your employees from trainings.

1. Select the **Training Coordinator** tab.

2. Select **Participation** link in your left-hand navigation bar.

3. Select the "Manage Participants" link in the left-hand navigation bar.

4. Type your employee's last name in the **Find** box to search for the employee(s) you would like to cancel for a training course.

5. Select "**Person**" from the drop-down menu below it and select the **Go** button.

   Helpful Hint: If you'd like to cancel all of your direct reports, just place the first four digits of your org unit number followed by an asterisk (*) in the "Find" field and select your "Organizational Unit" from the drop-down menu.

6. Highlight the employee from the "**Available"** box and select the arrow to insert employee into the "**Selected"** box.

7. Select the "**Next**" button

   Select the box next to the employee's name. The name and information are highlighted, and the employee's current training activities will populate in the bottom box.

8. Select the box next to the course name. The course is highlighted.

9. Select the "**Cancel Participation**" button.
   A pop-up box appears asking you to select a reason code for the cancellation.

10. Select "a cancellation Reason."

11. Select "OK"

12. Select the "Next" button. The confirmation screen appears.

13. Select the **Close** button.

Canceling/Changing Course Prebookings

As Agency Training Coordinator, you can also use the "Manage Participation" function to cancel your employees from their prebookings or modify their existing prebookings with a new date or location.

1. Select the **Training Coordinator** tab.

2. Select **Participation** link in your left-hand navigation bar.

3. Click on the "**Manage Participants**" link in your left-hand navigation bar.

4. Type your employee's last name in the **Find** box to search for the employee(s) you would like to cancel a prebooking for a training course.

5. Select "**Person**" from the drop-down menu beside the name and select the **Go** button.

   Helpful Hint: If you'd like to cancel all of your direct reports, just place the first 4 digits of your org unit number and an asterisk (*) in the "Find" field and select "Organizational Unit" from the drop-down menu.

6. Highlight the employee from the "**Available"** box and select the arrow to insert employee into the "**Selected"** box.

7. Select the "**Next**" button

8. Select the box next to the employee's name. The name and information is highlighted and the employee's current training activities will populate in the bottom box.

9. Select the "**Prebooked Courses**" tab.

10. Select the box next to the course name. The course is highlighted.
    The "Delete Prebooking" and "Change Prebooking" buttons are active.

    a. Select the "**Delete Prebooking**" button to delete. A confirmation pop-up box appears. Click either "**Yes**" OR,

    b. Select the "**Change Prebooking**" button to modify. A pop-up window appears which gives you the option of changing the validity dates and/or location. Click "**OK**" after making your changes.

11. Select the "**Next**" button. The final confirmation screen appears.

12. Select the **Close** button.

Course Assignments

A Course Assignment does not book your employees into a course; it merely places the course in their Messages and Notes section telling them to book the first available session of the training.

Course Assignments are a way to tell your employees they need to book a course or there is training that is strongly recommended for them to attend.

From your "Course Administration" tab:

1. Select **Participation** link in your left-hand navigation bar.

2. Select the "**Manage Mandatory Assignment**" link in your left-hand navigation bar. The "Manage Required Courses" screen appears.

3. Type the employee's last name in the **Find** box to search for the employee(s).

4. Select "**Person**" from the drop-down menu beside it and select the **Go** button.

5. Highlight the employee from the **"Available"** box and select the arrow to insert employee into the **"Selected"** box.

6. Select the "**Next**" button.

7. Select the box next to the employee's name. The name and information are highlighted.

8. Select the "**Select New Required Course**" button.

9. Browse the course catalog to look for the course, or select the radio button for "**Keyword Search**." The results of your search will be displayed in a window on the same screen.

10. Select the box next to the name of the training **course type** you would like to assign your employee. The course is highlighted.

11. Select the "**Next**" button. A screen allowing you to set the validity period for this assignment appears.

12. Select the "**Change Validity Period for All**" button to set a timeframe for the employee to complete this assignment.

    Helpful Hint: You must set the validity period to continue the assignment.

13. Select the "**Assign**" button. A summary screen appears.

    Helpful Hint: Select the "**Select New Required Courses**" button to assign additional courses to the employee.

14. Select the "**Next**" button.

15. Select the “**Next**” button *again* to save the assignment. The final confirmation screen appears.

16. Select the **Close** button.

Mandatory Assignments Report

As well as making mandatory course assignments to your employees, you can also run a brief report to check on their progress. We’ll look at how to do that next with the “Mandatory Assignments” report.

From your “**Course Administration**” section:

1. Select **Participation** link in your left-hand navigation bar.

2. Select the “**Mandatory Assignments Report**” link.
   The “Manage Required Courses” window appears.

3. Enter the employee’s personnel number in the “**Learner ID**” field.

4. If you do not know the employee’s personnel number, use the following search procedure:

   a. Choose "P Person” from the drop down box beside Learner Type.
   b. Click in the “Learner ID” field and then click in the box that appears beside the field.
   c. Type your employee’s last name in the search field.
   d. Click the “binoculars” icon. The search results appear.
   e. Click the employee’s name. The row is highlighted.
   f. Click the green “Check Mark” in the lower right-hand corner to confirm your selection. The “Learner ID” field populates with your employee’s personnel number.

5. Click the “**Execute**” button at the top right.
   The resulting report will show you the employee’s mandatory assignments and whether they have booked or completed them.

Employee Training Transcript

As the Agency Training Coordinator, you can run your employee’s training transcript at any time.

Select “**Reports**” from the bar just beneath the tabs.

1. Select the “**Course Transcript Report**” link. The “Prompts” window appears.

2. Select the “**Course End Date**” and enter the current date in the box provided by the system.

3. Select “**Participant Last Name**” and enter the employee’s last name *in all capital letters*, and select the Binoculars to search for the employee. The employee’s last name appears in the left-hand box. Press the > arrow to move the name to the box on the right.

4. Select the “OK” button. The transcript appears for all people with the same last name.